

AeCS User Manual

Version 14.03.28

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1. The AeCS documents and process

The purpose of the AeCS system is to support the process related to purchasing communication between a buyer and a seller. AeCS will handle the documents sent between the two parties in a structured way. This makes it easy to track the progress, both related to the purchasing itself, as well as the delivery.

The main data types handled by AeCS are:

- Request for proposal (RFP) with any Proposals that come as a response
- Purchase order with Purchase order confirmation
- Progress reporting
- Messages
- Attachments for all the above documents

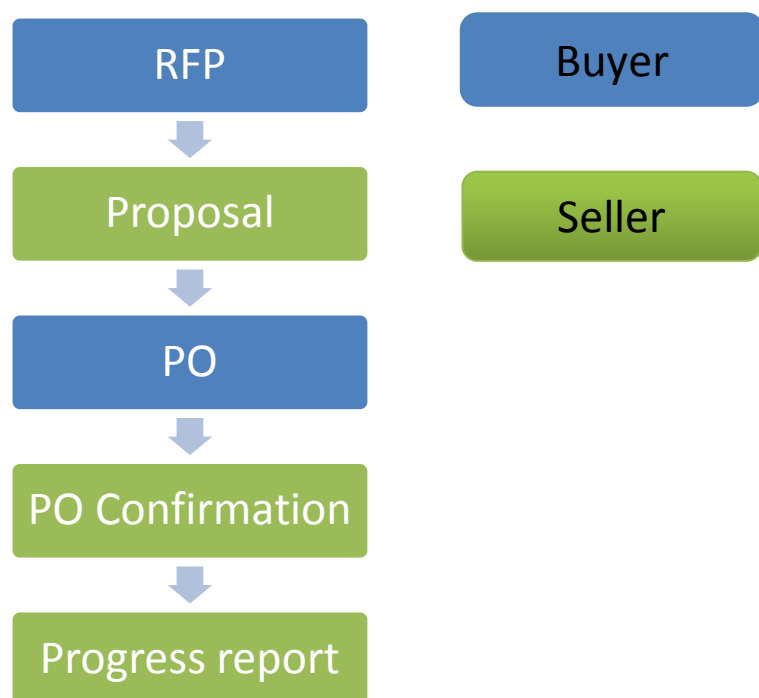


Figure 1 - The AeCS process flow

The buyers and sellers are linked together in a network. A company can have a buyer or a seller role, or both. When a buyer/seller company receives an RFP or a PO from a buyer, it can turn around to its own seller and send a corresponding RFP or PO to that company.

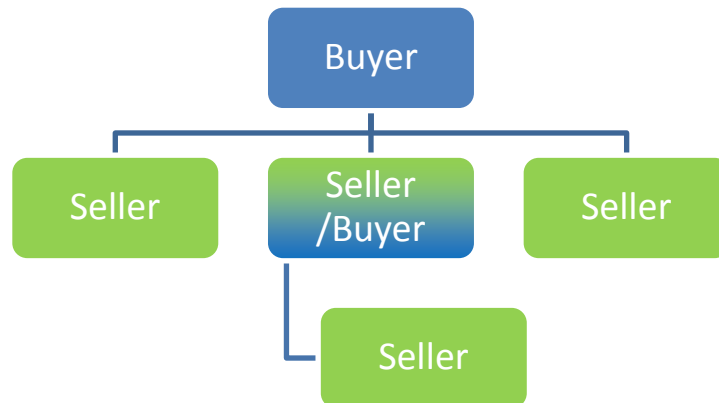


Figure 2 – A simple purchasing network

2. AeCS Registration and user roles

To use the AeCS system, your company must be registered in AeCS. Each user must have a personal user account.

If your company is already registered in AeCS, your company administrator will create a personal account for you.

If your company is not registered in AeCS, you can register using the registration form found on the www.aentera.com web pages. The company registration can be done in two ways:

- If you are a supplier company, you will receive a registration code from your customer (the AeCS buyer company). When you use this code during the registration, your company and account is immediately linked to your customer's purchasing network in AeCS. You can immediately start to receive documents from your customer.
- If you are a buyer company, you will receive a registration code from Aentera Network AS (subject to a license fee). On registration, you will automatically be registered as a buyer, and as the owner of your supplier network. You will immediately be able to add users within your company and distribute registration codes to your sellers in order to build your purchasing network.

2.1. User roles

There are different user roles in AeCS, depending on what role you have in your company.

2.1.1. The AeCS User role

This is a standard user, normally assigned to a purchaser or a seller. The *User* is able to create and send documents. This role is limited to see only his/her own documents.

2.1.2. The AeCS Coordinator role

The *Coordinator* is able to create and send documents. The *Coordinator* can see and modify all documents in the company. This means that the *Coordinator* can act on the behalf of the other users in the company. The *Coordinator* role is normally assigned to a group- or department manager.

2.1.3. The AeCS Viewer role

The *Viewer* can see all documents in the company, but can not modify any documents.

2.1.4. The AeCS Company administrator

Across the three basic roles, one or more users can have a *Company administrator* role. The *Company administrator* can create new users and manage company data and settings.

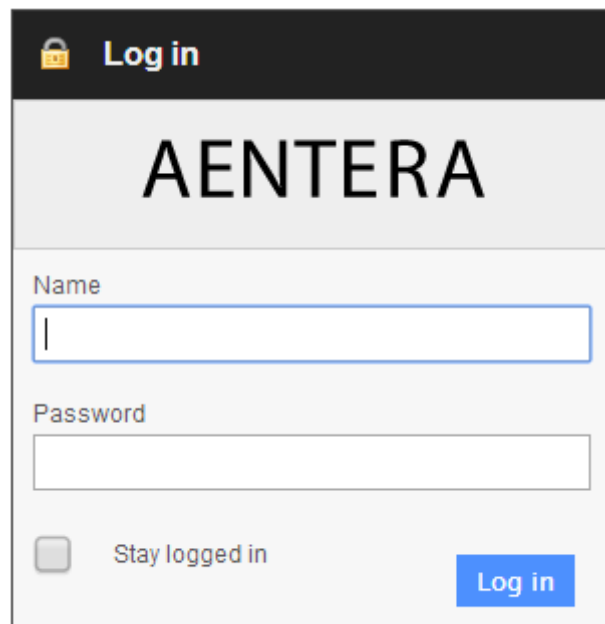
2.1.5. The AeCS Company default user

If the buyer has not chosen any specific seller as the recipient of the RFP or PO, it will be sent to the *Company default user*. The company administrator manages which user will be the *Company default user*.

3. Logging in

The login dialog is accessed from the www.aentera.com webpage. Enter your personal username and password to log in. Do not share your personal user name and password with other persons.

If you need your own login name, please contact your internal AeCS *Company administrator*.

The login dialog is a web form with a dark header bar containing a lock icon and the text "Log in". Below the header, the word "AENTERA" is displayed in large, bold, black letters. The form contains two input fields: "Name" and "Password". Below the "Password" field, there is a checkbox labeled "Stay logged in" and a blue "Log in" button.

Press here if you have [forgot your password](#).

Figure 3 - The login dialog

Remember me? If you check this option, your login credentials will be remembered if you close your browser. You will get back into AeCS without re-typing your username and password. If you use the *Log Out* function to log out of AeCS, your credentials will be erased, and you would have to enter your user name and password to get back into AeCS.

3.1. Forgot you password?

If you have forgotten your password, use the link below the login dialog to reset your password. Enter your registered email address, and an email will be generated with instructions on how to reset your password. The email will only be valid for a limited amount of time. If you do not reset your password within this time, you must generate a new email.

Alternatively, your AeCS company administrator can also reset your password for you.

4. The User interface

After logging in, you will enter your AeCS home page. This page gives you an easy access to all current documents and tasks.

4.1. The home page

4.1.1. The main ribbon

The main functions are placed in the top ribbon. This includes:

- Home page
- Create new documents
- Draft documents
- Received documents
- Sent items
- Archive
- Progress reports
- Search
- Settings
- Help

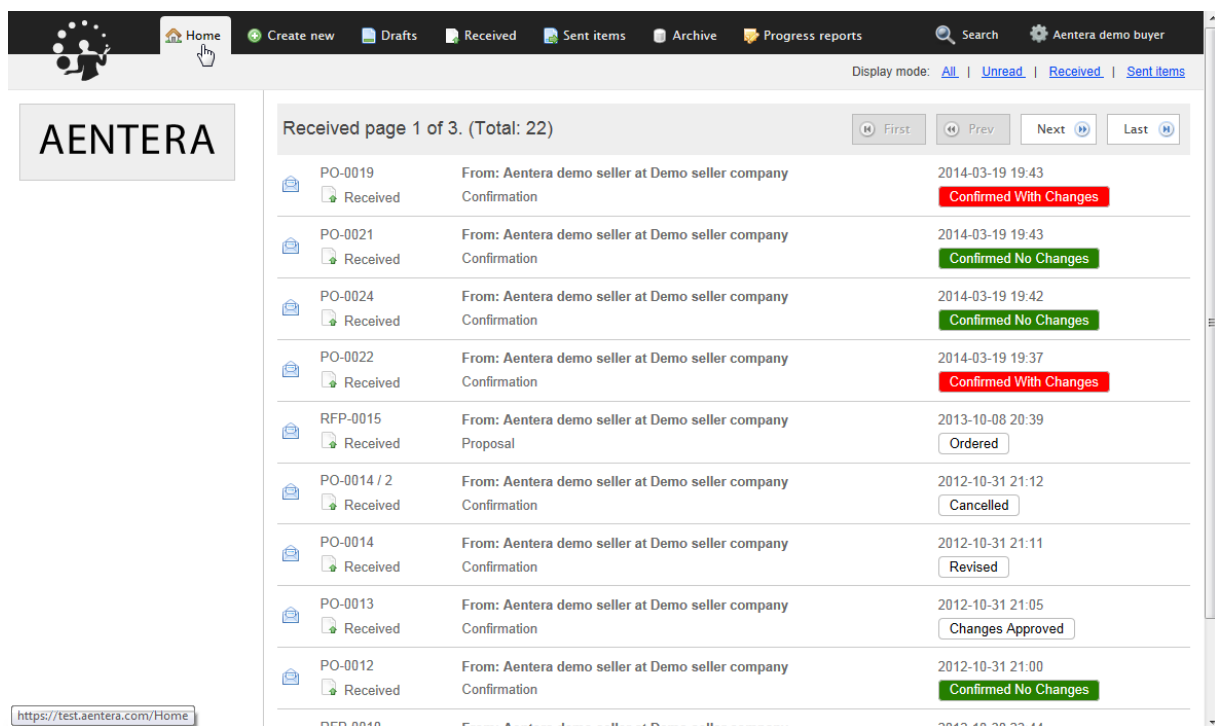


Figure 4 - The home page

4.1.2. The left menu

In the left menu, the most commonly used actions are stored as shortcuts.

4.1.3. The main pane

In the main pane, documents relevant to your user role are listed.

If you have unread documents that should be addressed, these will be the only ones listed. If you have no unread documents, all active documents will be listed. Using the

menu in the upper right hand corner of the main pane, you can change between displaying All, Unread, Received or Sent documents.

4.1.4. Administrative functions

In the upper right hand corner of the home page, there are administrative functions. Use these to

- Administrate your own user data and settings
- Administrate/list company data(depending on role)
- Administrate/list company settings (depending on role)
- Log out

4.2. Filters and sorting in the overviews

You can specify filters to restrict the documents that will be displayed in your overviews. In the overview, press the Configure Filter button

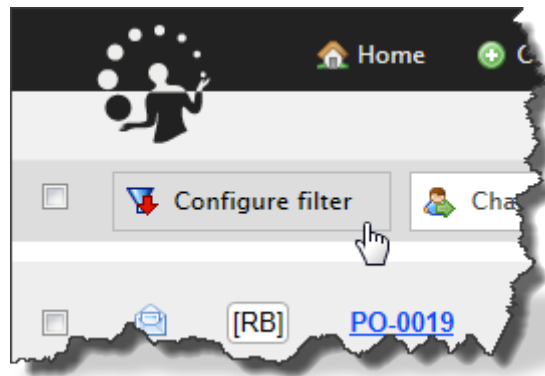


Figure 5 – Define filter

A dialog will be displayed, where you can define a filter based on the following attributes:

- Document type
- Document status
- Responsible user
- Partner company

In addition, you can define which attribute to sort by, and whether to sort ascending or descending. If you have many pages in your results list, you can jump to a specific page by entering the page number in the dialog box.

After all filter parameters are set as you desire, press the *Apply filter* button to update your list view.

To modify a filter, bring up the filter dialog box again and modify your filter values.

To remove your filter and reset the list to show all documents, press the *Reset filter* button

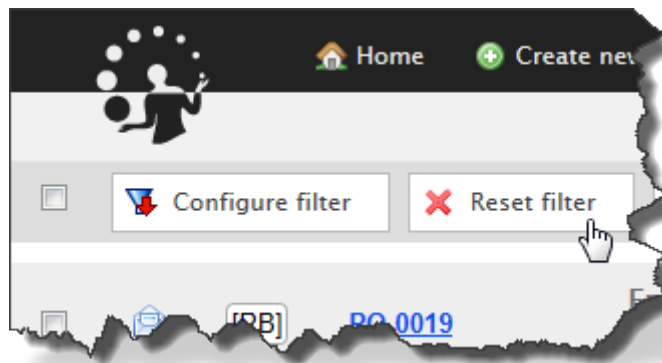


Figure 6 – Reset filter

4.3. Create new document

If you are in a buyer company, you will be able to create a Request For Proposal (RFP) or Purchase Order (PO). Press the *Create New* button in the top ribbon to bring up the page that lets you choose what document type to create. A partially filled form will appear. Fill in the required and relevant fields before sending it to the recipient. More on document creation in section 5 – “*Creating and sending a Request for Proposal (RFP) or a Purchase Order (PO)*”.

If you are a seller company, you will not be able to create any new documents without first having received an RFP or a PO from a buyer.

Buyer and seller documents will be related to each other in what is called a document chain. The chain consists of an RFP with Proposal and/or PO with PO confirmation.

4.4. Drafts

The *Drafts* page will list all documents you have created but still not sent to any recipient.

You can delete any document that is in a *Draft* status. After the document is sent, it can not be deleted.

4.5. Received

The *Received* tab lists all documents that you have received from your business partner(s). If you have many active documents, the list will be split into multiple pages. (The number of documents per page is dependent on your personal user setting) You can navigate to next/previous and first/last page by using the buttons.

You can apply a filter to specify which document type to list, and can also define which attribute to sort the list by.

4.6. Sent Items

The *Sent Items* tab lists all documents that you have sent to your business partner(s). If you have many active documents, the list will be split into multiple pages. (The number of documents per page is dependent on your personal user setting). You can navigate to next/previous and first/last page by using the buttons.

You can apply a filter to specify which document type to list, and can also define which attribute to sort the list by.

4.7. *Archive*

To make it easier to keep an overview of your active documents, it is recommended that you archive documents that no longer require your attention. Documents may be archived by

- Using the menu within the document.
- Selecting one or more documents in the overviews and use the *Archive* function.

When archiving a document, some key document functions are disabled from the user interface, and it does not appear in the *Received* or *Sent Items* lists. Archiving a document can be seen as a housekeeping activity, and does not affect the document properties in any way.

If you need to resume working on the document, you can un-archive it to bring it back into the list of active documents, re-activating the document functions. Un-archiving is done by

- Using the menu when in the document.
- Selecting one or more documents in the overviews and use the *Un-Archive* function.

4.8. *Progress reports (option)*

If this option is enabled, the buyer will be able to request progress reports from the seller company.

As a buyer, the list shows progress reports submitted by the seller.

As a seller, the list shows the documents that the buyer has requested progress reports for.

More on progress reports in section 8 - Progress reporting

5. Creating and sending a Request for Proposal (RFP) or a Purchase Order (PO)

To create a new document, enter the *Create New* menu in the top ribbon. You can then select whether you want to create an RFP or a PO interactively, or upload an XML file (Requires a specific file format). For more on XML upload, see section 5.8- *XML upload*.

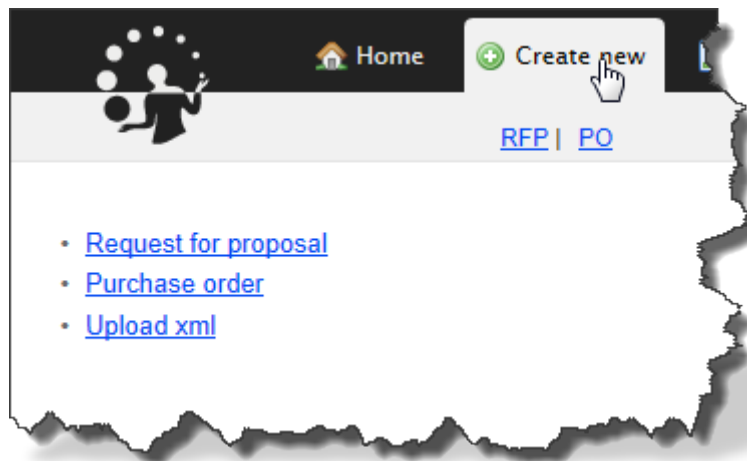
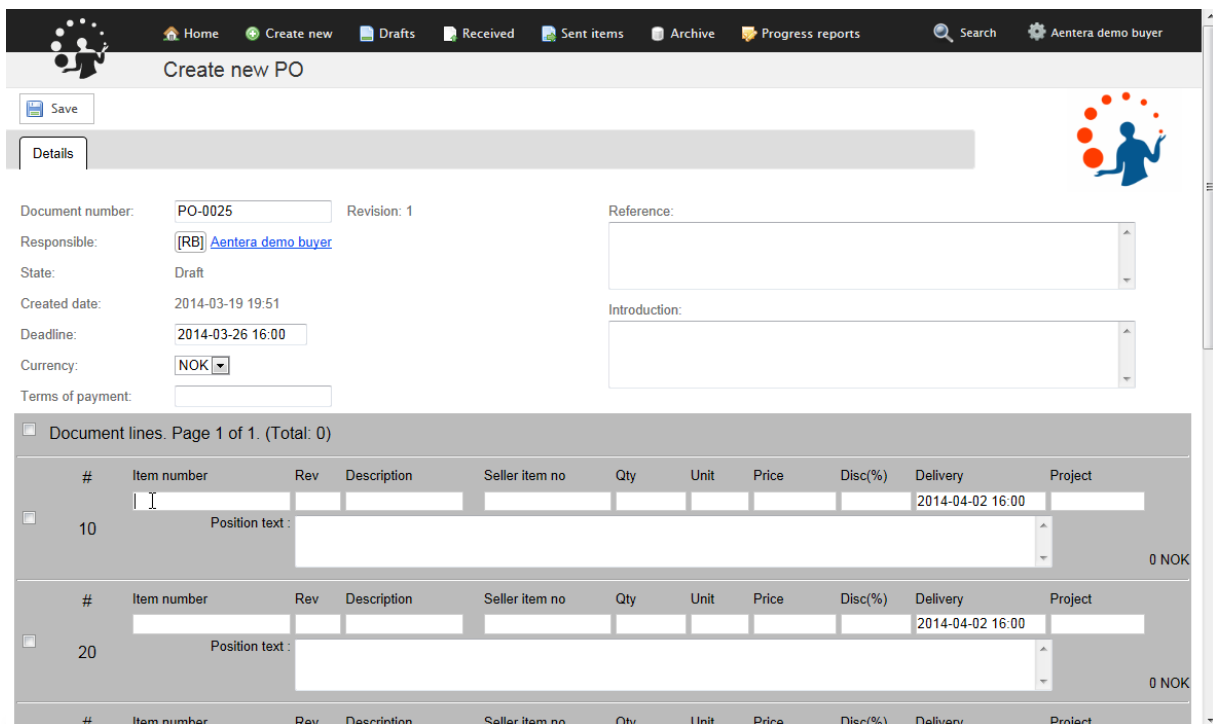


Figure 7 – Create new document

After choosing document type, a form is displayed. This form will contain all your basic and default company data, ready to be populated with your document data.

The following sections describe the different parts/tabs in your document.

5.1. The Details tab



Document number: PO-0025 Revision: 1

Responsible: [RB] Aentera demo buyer

State: Draft

Created date: 2014-03-19 19:51

Deadline: 2014-03-26 16:00

Currency: NOK

Terms of payment:

Reference:

Introduction:

Document lines. Page 1 of 1. (Total: 0)

#	Item number	Rev	Description	Seller item no	Qty	Unit	Price	Disc(%)	Delivery	Project
10			Position text :						2014-04-02 16:00	
										0 NOK
20			Position text :						2014-04-02 16:00	
										0 NOK

Figure 8 - The Details tab

When first creating a new document, only the *Details* tab appears. In this tab, you enter some of the overall document data, like

- RFP/PO number (if not automatically assigned)
- The RFP or PO item lines
- Due dates
- Terms and conditions
- Place of delivery
- Etc.

After entering the minimum of required data (may vary from company to company), press **Save**. Your document is now stored in the database, and is placed in a *Draft* status. You can also find the document in the *Drafts* folder.

After saving the document to the database, the remaining document tabs will also appear.

5.1.1. Adding or deleting document item lines

The company administrator defines how many document lines that will appear in a new document.

There is a button to create one new document line. Through the *More actions* button, you can:

- Add 5 item lines
- Add 10 item lines
- Duplicate the line(s) you select. The new duplicate lines will be put in the bottom, after the existing lines
- Delete selected lines
- Delete empty lines

Any empty lines will automatically be deleted when the document is sent.

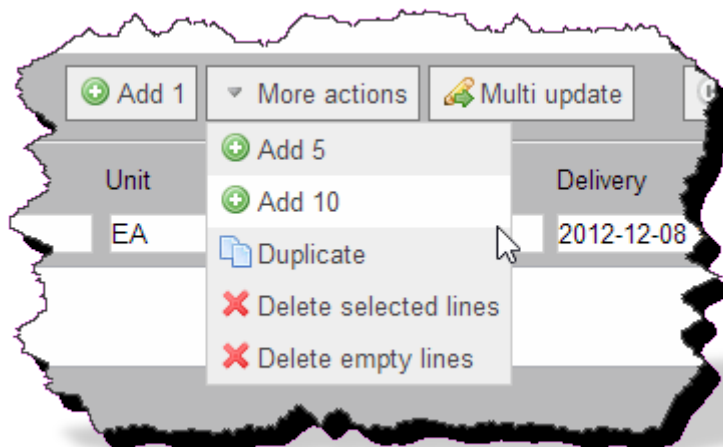
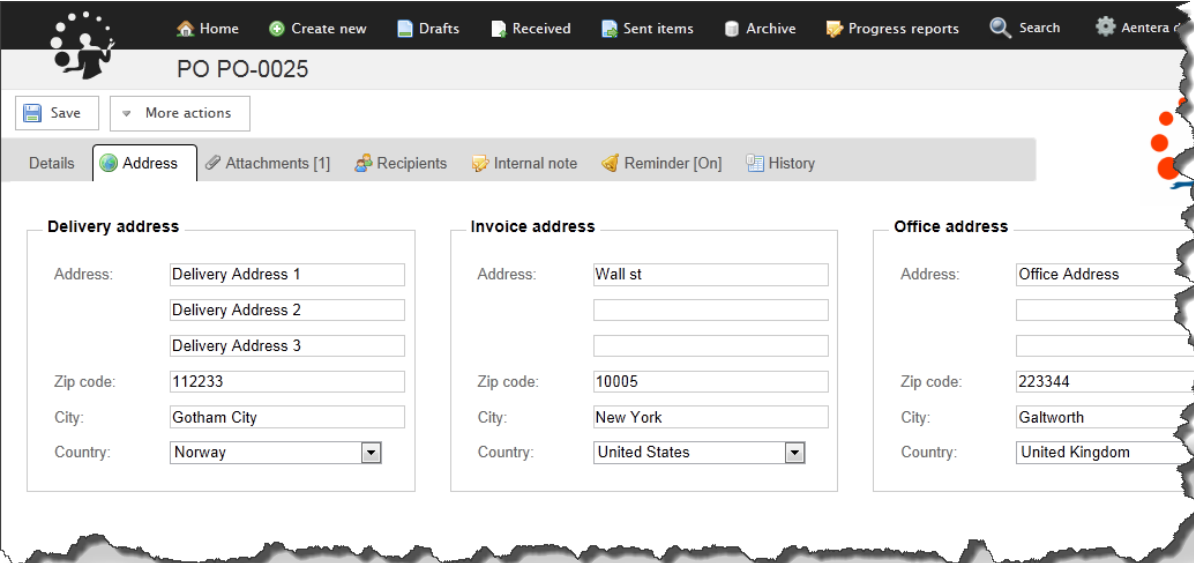


Figure 9 - The line items *More actions* button

5.2. The Address tab



The screenshot displays the 'The Address tab' for a Purchase Order (PO) with ID PO-0025. The interface includes a top navigation bar with links like Home, Create new, Drafts, Received, Sent items, Archive, Progress reports, Search, and Aentera. Below the navigation bar, there are tabs for Details, Address (selected), Attachments [1], Recipients, Internal note, Reminder [On], and History. The main content area is divided into three columns for different address types:

Delivery address	Invoice address	Office address
Address: Delivery Address 1 Delivery Address 2 Delivery Address 3	Address: Wall st 	Address: Office Address
Zip code: 112233	Zip code: 10005	Zip code: 223344
City: Gotham City	City: New York	City: Galtworth
Country: Norway	Country: United States	Country: United Kingdom

Figure 10 - The Address tab

Before sending the document, it is possible to change address details for the RFP or PO. Initially, the fields contain the default company addresses, but before sending the document, you have the possibility of changing:

- Delivery address
- Invoice address
- Office address

5.3. The Attachments tab

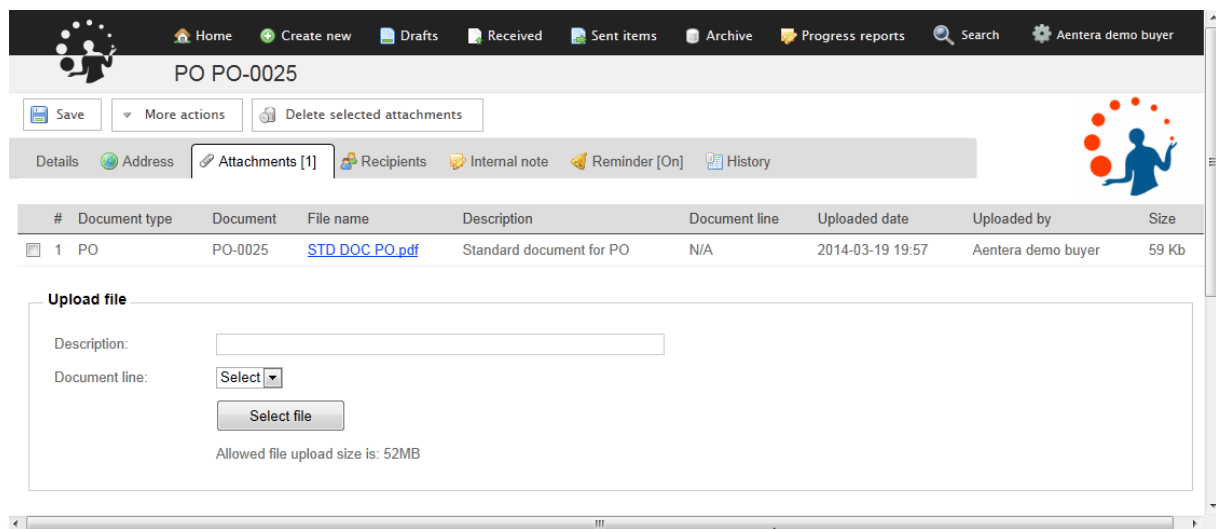


Figure 11 - The attachments tab

5.3.1. Adding files as attachments

As long as the document has not been sent, it is possible to add (or delete) files as attachments.

(NOTE: For a seller, it will be possible to add file attachments to the PO confirmation after has been sent)

When adding an attachment, you can add a comment to describe the file. You can also possible to relate the attachment to one specific document line. Use the *Browse* button to locate your file, and the file will be uploaded. It is not possible to alter this information once the file has been uploaded. If you need to do so, you should delete the file and upload it again with the correct information.

To delete an attachment, select the check box to the left and press the *Delete Selected Attachments* button.

In some instances, one or more files are automatically attached on document creation. These are standard attachments that your company has specified to always follow this type of document.

5.3.2. Downloading attachments

When receiving a document, the number of attachments is indicated by the number in [brackets] on the attachments tab.

You can download one file at a time, or choose to download all in one zip file.

5.4. The Messages tab

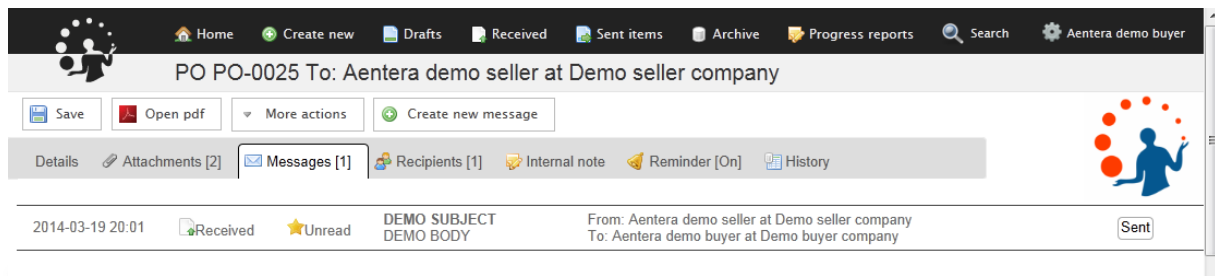


Figure 12 - The Messages tab

AeCS has a built-in system for handling messages related to a document (or chain of documents). It is recommended that all messages and written communication related to a purchasing document is kept within AeCS, and not within a separate mail system. The messages will then be available to any user with the sufficient authorization, rather than being hidden in someone's personal mailbox.

If there are messages sent or received for the document, they will be listed in this tab. The number of messages will be displayed in the [brackets] on the *Messages* tab.

5.4.1. Sending a message

Press the *Create new message* button to open the form to create a new message. Enter subject and message text. You may also add files as attachments.

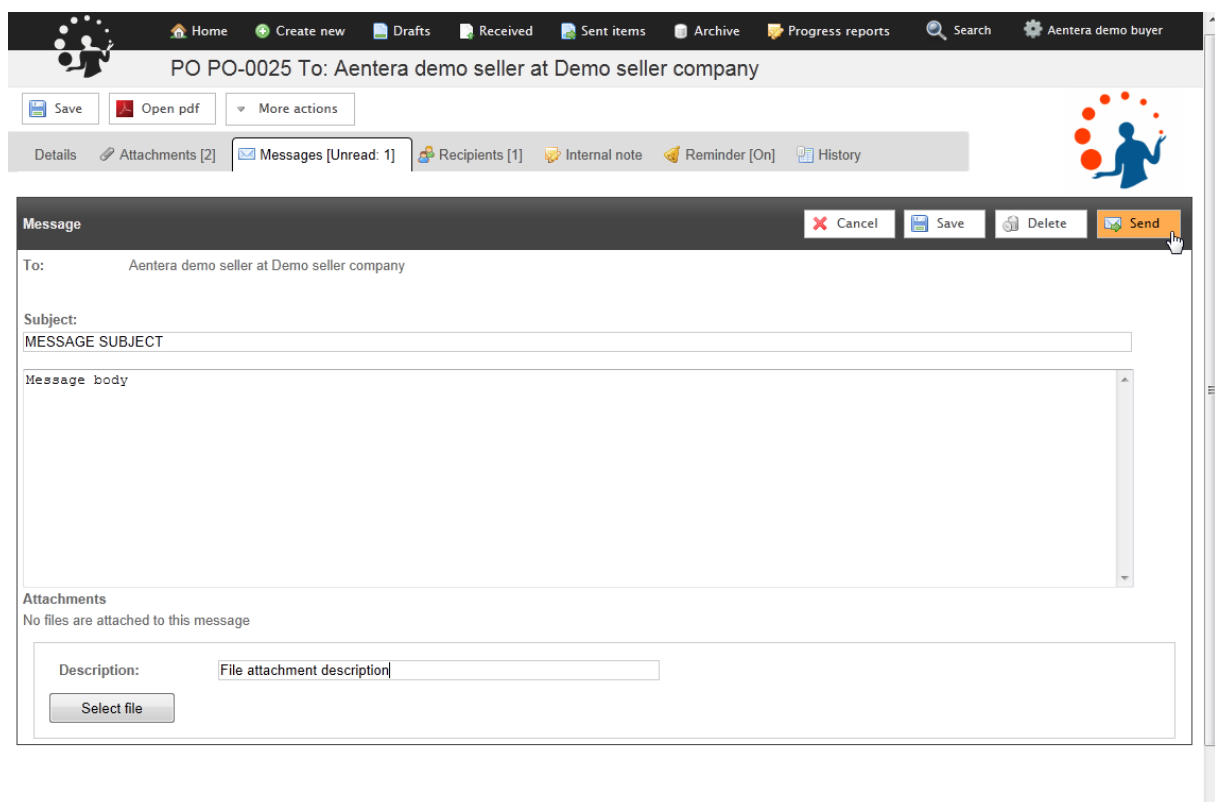


Figure 13 - Creating a new message

It is possible to save the message without sending it. It will then appear with a *Draft* status in the list of messages.

As long as the message has not been sent, it is possible to delete the whole message or any file attached to it.

When pressing *Send*, the message will be sent to the same recipient as for the document itself. Unless the recipient has disabled notifications, the recipient will receive an email telling that a message is sent in AeCS. The email is only a notification, and the message itself will not be included in this email. The recipient would have to enter AeCS to read the message.

5.4.2. Replying to a message

If multiple files are attached to the message, you can download the files one by one, or as one zip file.

While displaying the message, you can press the *Reply* button to create a reply to the message you have opened. Creating and sending a reply works just like sending a new message.

5.5. The Recipients tab

As a buyer, you can select recipient(s) for your document. For a Request for Proposal (RFP), you can send the document to more than one recipient. For a PO, you are limited to only one recipient.

The number of recipients for an RFP is shown in [brackets] on the tab.

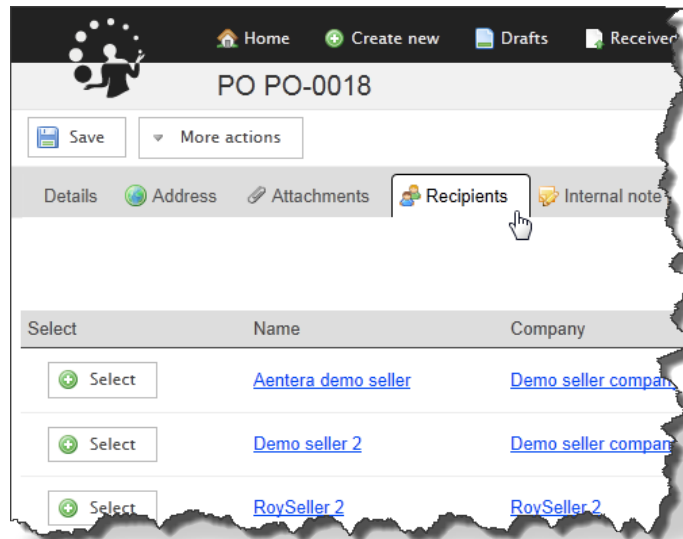


Figure 14 - The Recipients tab

5.5.1. Adding a recipient

When bringing up the recipients tab, the last sellers you have used will be listed directly.

If the person you want to send the document to is not listed, expand the list of sellers by selecting *All* recipients.

From the list, press *Select* to select the recipient(s) you want to specify for this document.

If you want to delete a recipient already selected for the document, press the *Delete* button to the right.

5.5.2. Showing the document status

After the document has been sent, the recipients tab will show the document status for the individual recipients. You can use this to track the progress of the RFP.

5.6. *The Internal note tab*

For each document, you can enter an internal note that is visible only to users within your own company. The recipient(s) will not see the internal note. It will not be printed in any of the standard printouts or pdfs.

Enter the text and press Save to store the internal note in the database.

If there is a chain of documents, the internal notes for previous documents will also be listed in a read-only mode.

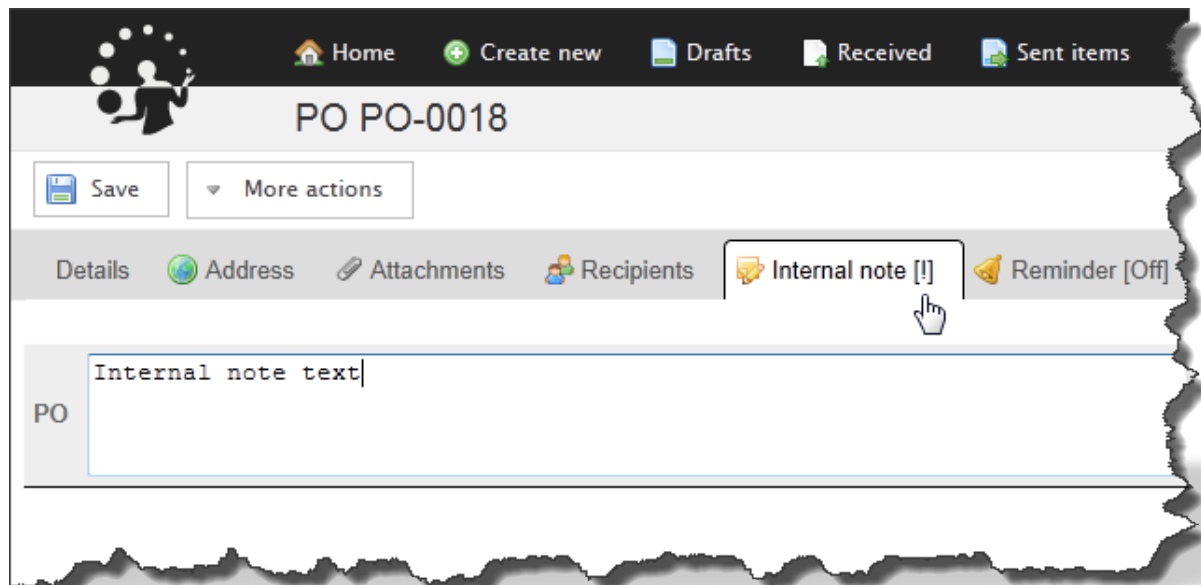
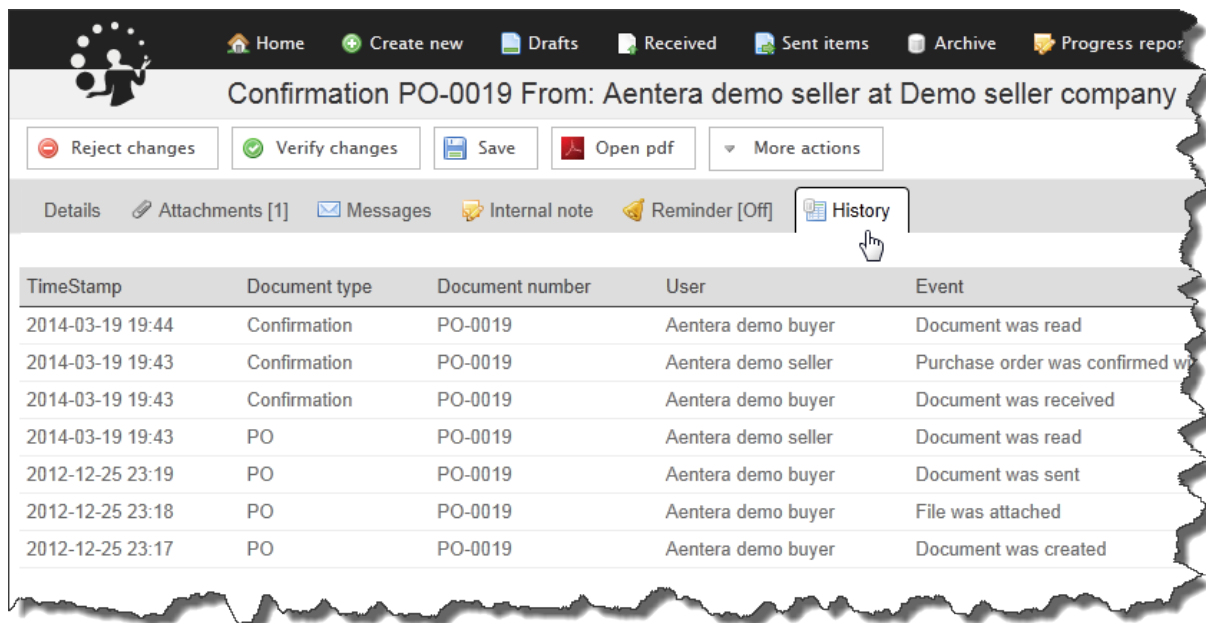


Figure 15 - The internal note tab

5.7. The History tab

In the history tab, all activity for the document is listed. The history lists both sender and recipient(s) activity.

If the document is part of a document chain, all past activities for past documents are also listed.



TimeStamp	Document type	Document number	User	Event
2014-03-19 19:44	Confirmation	PO-0019	Aentera demo buyer	Document was read
2014-03-19 19:43	Confirmation	PO-0019	Aentera demo seller	Purchase order was confirmed w
2014-03-19 19:43	Confirmation	PO-0019	Aentera demo buyer	Document was received
2014-03-19 19:43	PO	PO-0019	Aentera demo seller	Document was read
2012-12-25 23:19	PO	PO-0019	Aentera demo buyer	Document was sent
2012-12-25 23:18	PO	PO-0019	Aentera demo buyer	File was attached
2012-12-25 23:17	PO	PO-0019	Aentera demo buyer	Document was created

Figure 16 - The History tab

5.8. XML upload

If your company has set up a file format for it, it is possible to upload an XML file to create a new document. To upload an XML file, press the *Upload XML* button in the *Create New* menu. A dialog will appear:

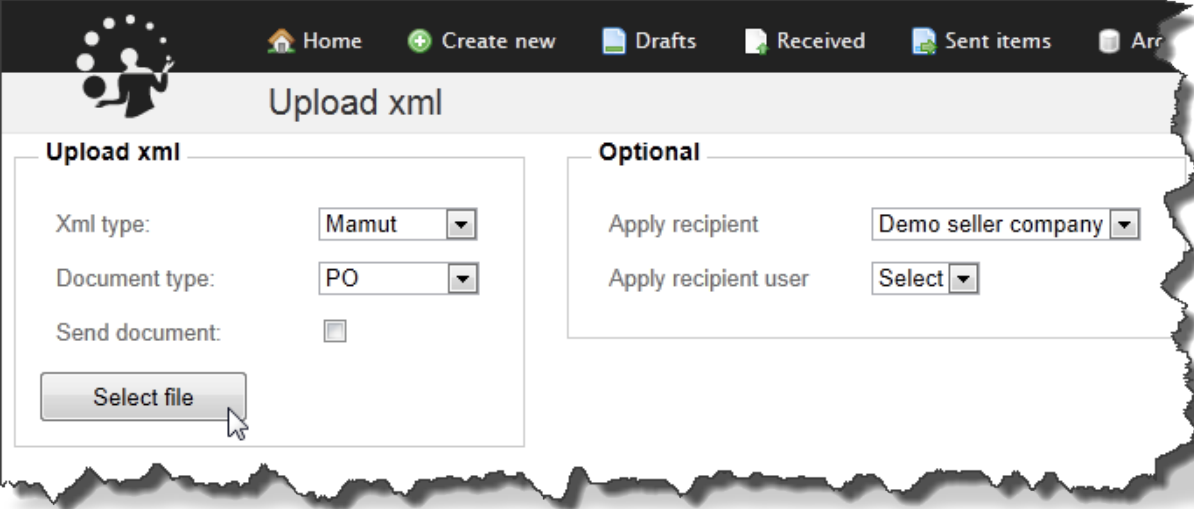


Figure 17 – Upload XML

The *XML type* will be as specified by the AeCS Company Administrator in your company. The *XML type* must match the specific format of your XML file. For *Document type*, you can either use the default type as specified in the XML file, or override to create specifically an RFP or a PO. If you want to send the document immediately after file upload, check the *Send document* check box.

To specify the recipient, select the company and user you want to send the document to.

6. Creating, sending and receiving a proposal

If you are a seller and have received a *Request for Proposal (RFP)* from a buyer, you can respond by sending a *Proposal*. This section describes how to process an *RFP* and respond with a *Proposal*

6.1. Accept RFP

After opening and reading the RFP, you can either *Accept* or *Reject* the RFP. If you accept, you indicate to the buyer that you want to send a proposal. If you reject, you indicate to the buyer that you will not send a proposal.



Figure 18 - Accept RFP

6.2. Create and send proposal

After accepting the RFP, press the *Create Proposal* button to start creating your proposal. The data from the RFP will be copied into the draft proposal.



Figure 19 - Create proposal

Which fields you can modify is determined by rules set by the buyer. As a minimum, you will normally be able to modify the quantity, delivery date and price of each item line. You will also be able to add files as attachments.

It is possible to save the proposal without sending it. It will then be put in the Drafts folder.

After the proposal has been completed, press the Send button to send it to the Buyer.

6.3. **Receive and respond to a proposal**

When opening a proposal you have received, you will see the link between the original RFP and the proposal. You can navigate between the documents by using the links in the upper right hand corner of the document.

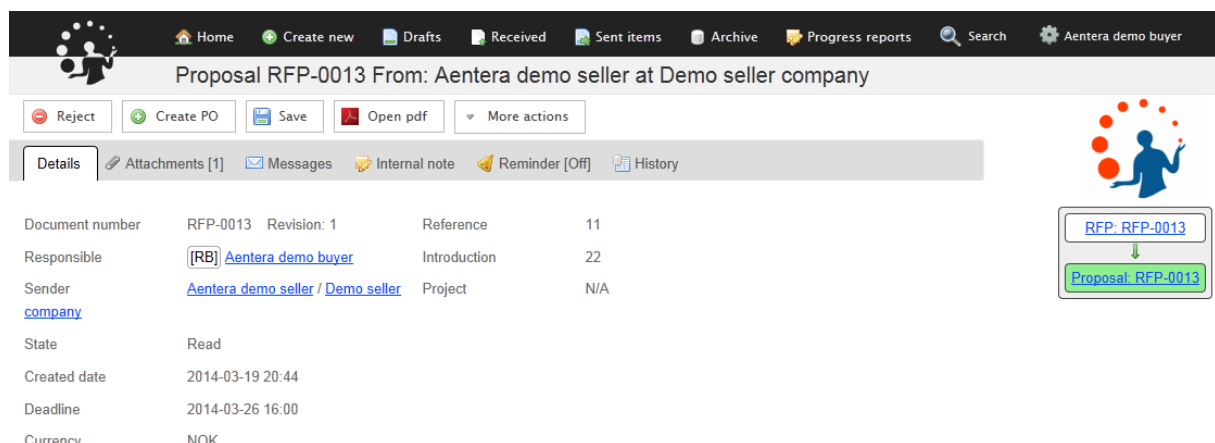


Figure 20 - Links between documents

If the seller has made modifications compared to the RFP, the old values will be in dimmed strikethrough text, and the updated values in a red text. It will then be easy to get an overview of what the seller has made as an input to, compared to your RFP.

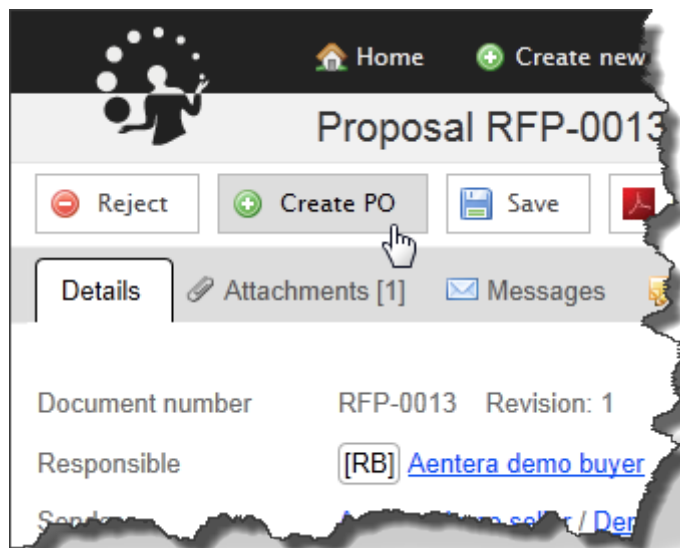


Figure 21 - Create PO from proposal

If the proposal is not acceptable, and you do not want to place a PO based on it, press the *Reject* button. The seller will be notified that you have rejected the proposal.

If you would like to place a PO based on the proposal, press the *Create PO* button. A PO will then be created based on the data in the proposal. If you choose to change any of

the data in the PO, the seller will see the differences between the proposal and PO in the same way as the differences between the RFP and proposal is highlighted to the buyer.

7. Confirming a Purchase Order (PO)

When you receive a *Purchase Order*, it is important to respond to the PO within the deadline set by the buyer. The PO can be

- Confirmed without changes
- Confirmed with changes
- Rejected

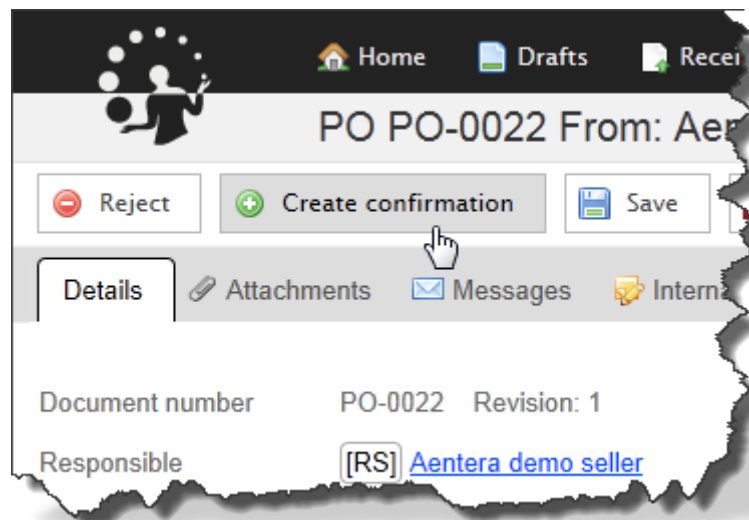


Figure 22 - Create Purchase Order Confirmation

7.1. Confirm without changes

If the delivery dates, quantities and other terms&conditions are OK, you will confirm the PO without any changes. The buyer will get a message that you have confirmed the PO as-is. When confirming without changes, no more actions are required in AeCS for this PO, except archiving the PO when the job is completed. (Or any other time you would like to archive the PO.) The confirmation represents the formal agreement between the buyer and the seller.

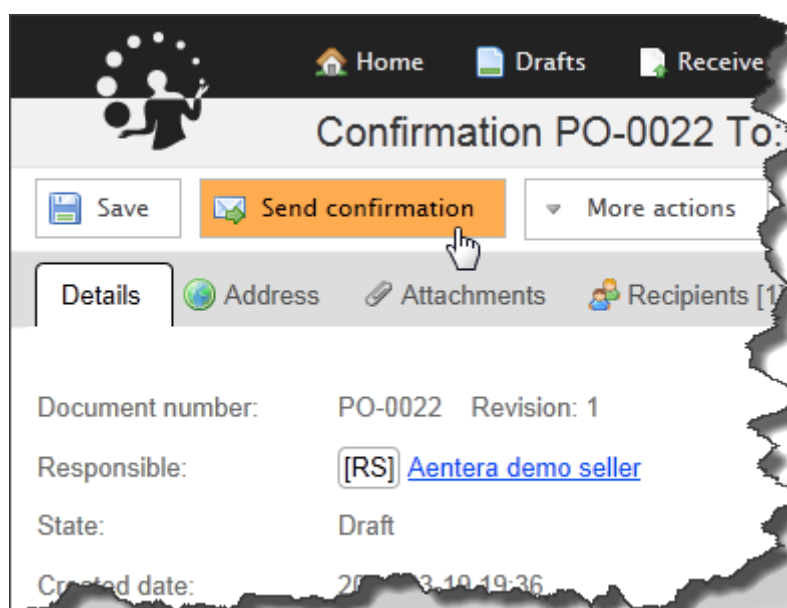
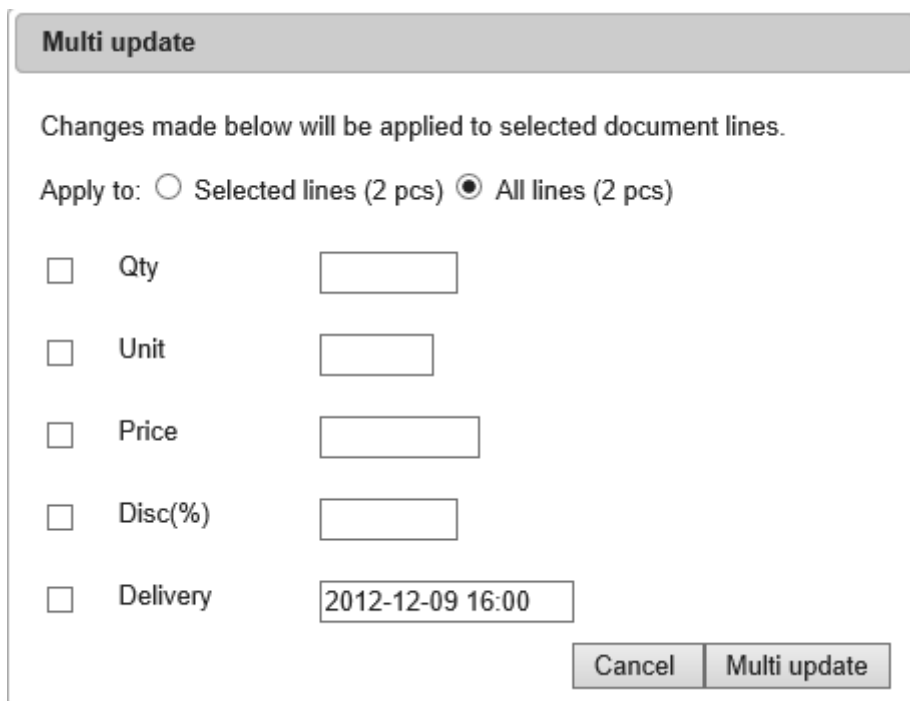


Figure 23 - Send Purchase Order Confirmation

7.2. Confirm with changes

If you are not able to deliver according to the dates, quantities or other terms&conditions, you can confirm the PO, but with the data that is acceptable or possible to you.

You can modify the fields as defined by the buyer. This can be fields both on the PO header and the individual lines. Only fields you are allowed to modify will be enabled for modification. You can enter the updated information line-by-line, or multiple lines in one go. To update multiple lines, select the lines you want to modify and press the *Multi Update* button in the upper right hand corner above the item lines to open the dialog. You will then be able to enter data that will be populated to all the selected lines. Alternatively, you can choose to update all lines at once by checking the box in the popup.



Multi update

Changes made below will be applied to selected document lines.

Apply to: ☐ Selected lines (2 pcs) ☒ All lines (2 pcs)

☐ Qty	
☐ Unit	
☐ Price	
☐ Disc(%)	
☐ Delivery	2012-12-09 16:00

Figure 24 – Update multiple lines

When sending this confirmation, the agreement between the buyer and seller is pending the buyer's approval to the *Seller's* changes to the PO.

When sending this confirmation, the *Buyer* is immediately notified by email that a PO confirmation with changes is pending approval. A formal agreement between the buyer and the seller is not completed until the buyer has accepted the sellers new and modified input.

After the *Buyer* has accepted the changes, the formal agreement is considered to be completed.

If the input from the seller is not acceptable to the *Buyer*, he/she will reject the confirmation, and the whole PO is cancelled.

7.3. Reject

If the *Seller* can not or will not meet the dates, quantities and other terms&conditions of the PO, the *Seller* might choose to reject the whole PO. The *Buyer* is notified that the

Seller has rejected the PO. In this case, no formal agreement is established between the *Buyer* and the *Seller*.

It will be possible for the *Buyer* to re-send the PO under a new revision. It will also be possible for the seller to re-send a new revision of the PO confirmation.

7.4. **Re-confirming a PO (Revise order confirmation)**

If, for any reason, the *Seller* would like to update his PO confirmation, it is possible to do this without the *Buyer* sending a new revision of the PO.

Typically, this might be if delivery dates and/or quantities have changed/improved.

After opening the PO confirmation, the *Seller* can press the *More actions - Revise* button to create a new PO confirmation. Enter the new data and send the PO confirmation again.

The re-confirmation will behave as a regular PO confirmation, depending whether it has been confirmed with or without changes, compared to the original PO. If it has been confirmed with changes, it will be pending the *Buyer's* approval. Until this approval has been made by the *Buyer*, the previous revision is still the valid one.

NOTE: Please note that updates to a PO confirmation should be sent as a new revision, and NOT as an attachment to the existing PO confirmation or as an attachment to a message in AeCS.

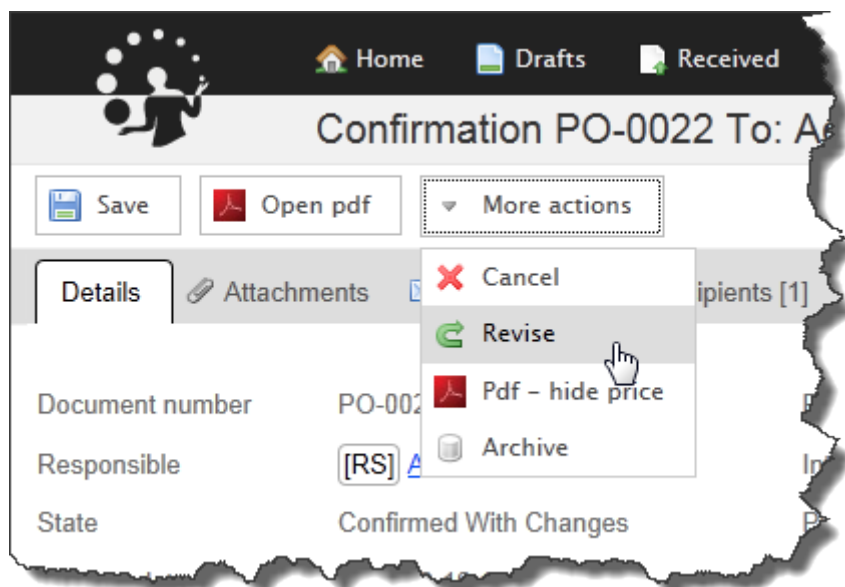


Figure 25 – Revise a PO confirmation

7.5. **Adding attachments to a PO confirmation**

Unlike other document types, it is possible to add attachments to the *PO confirmation* even after it has been sent. This may be relevant the cases where certificates, manufacturing record books etc. need to be sent to the buyer. All correspondence and data related to the PO will then be stored in one place, linked to the PO.

7.6. **Change the document's responsible person**

Unless a specific recipient was set when the document was sent, it will be sent to the default company user. If this is not the person who shall work with the document, it is possible to change the responsible person for it.

Note: Only a person with the coordinator role has privileges to change document responsibility.

To change document responsible for the active document, press the *More actions - Change Responsibility* button when inside the document.

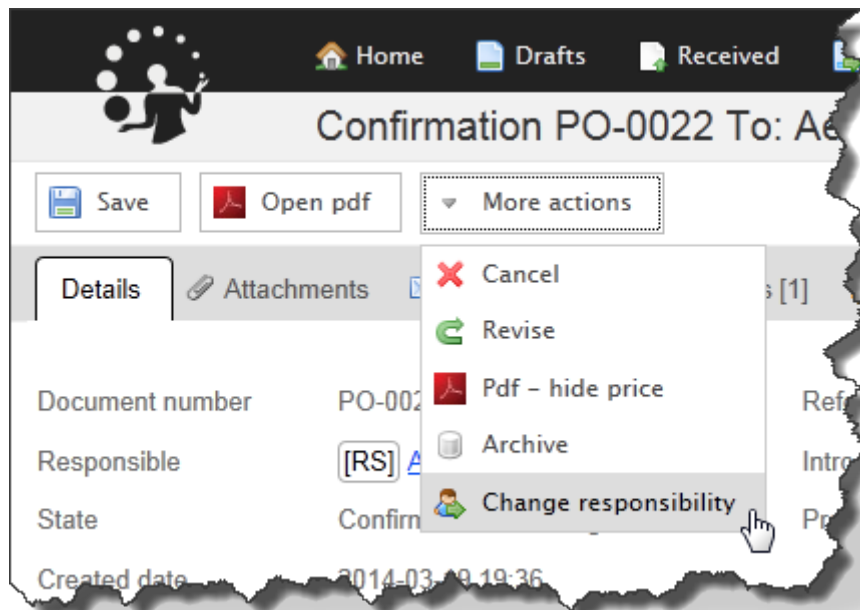


Figure 26 – Change document responsibility - single

To change document responsible for several documents, check the desired documents in the list and press the *Change Responsibility* button.

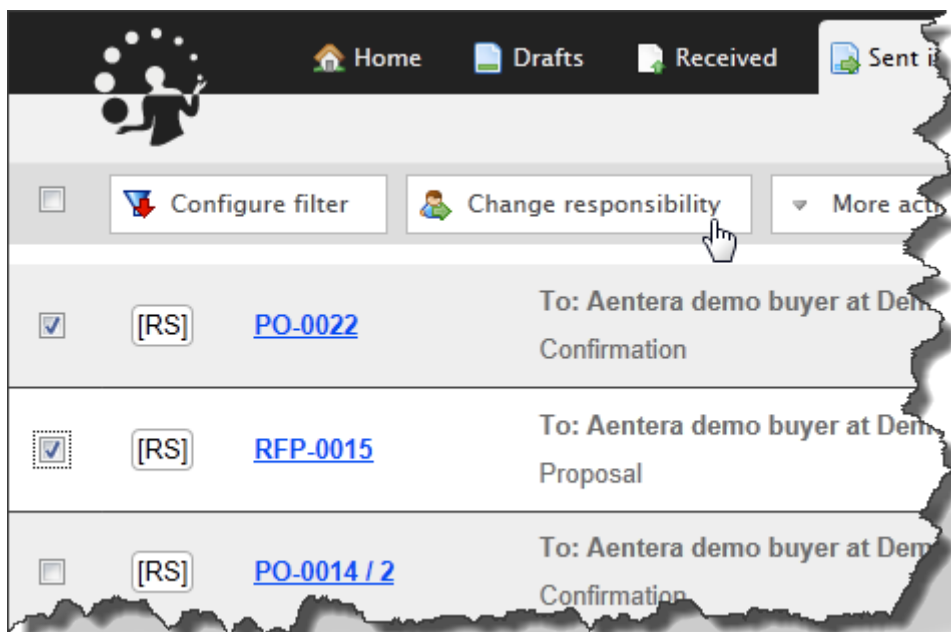
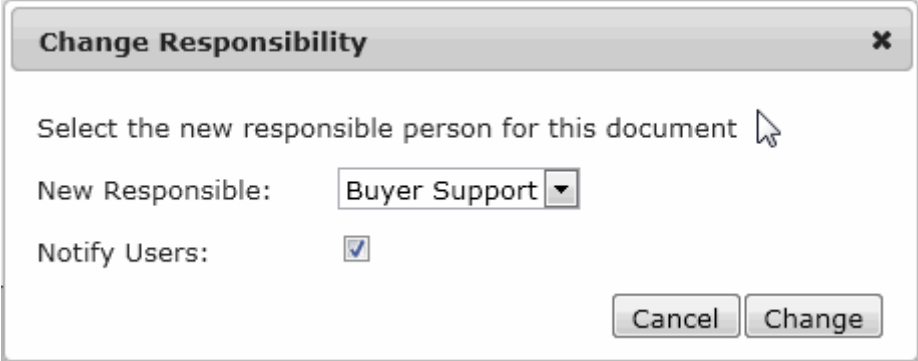


Figure 27 – Change document responsibility - multiple

A dialog pops up, where you can select the new responsible person for the document(s). You can also choose whether the old and new responsible persons shall be notified by email.

A screenshot of a "Change Responsibility" dialog box. The dialog has a title bar with the text "Change Responsibility" and a close button (X). Inside, there is a text label "Select the new responsible person for this document" with a mouse cursor pointing to it. Below this, there is a label "New Responsible:" followed by a dropdown menu showing "Buyer Support". Underneath, there is a label "Notify Users:" followed by a checked checkbox. At the bottom right, there are two buttons: "Cancel" and "Change".

Change Responsibility ✕

Select the new responsible person for this document

New Responsible: Buyer Support ▼

Notify Users: ☒

Cancel Change

Figure 28 - Send Purchase Order Confirmation

When the selections are made, press *Change* to submit the changes.

8. Progress reporting

The AeCS system can be used to track progress of each order and order line. The seller can report at any time he/she likes, and all the progress reports will be stored in sequence in AeCS.

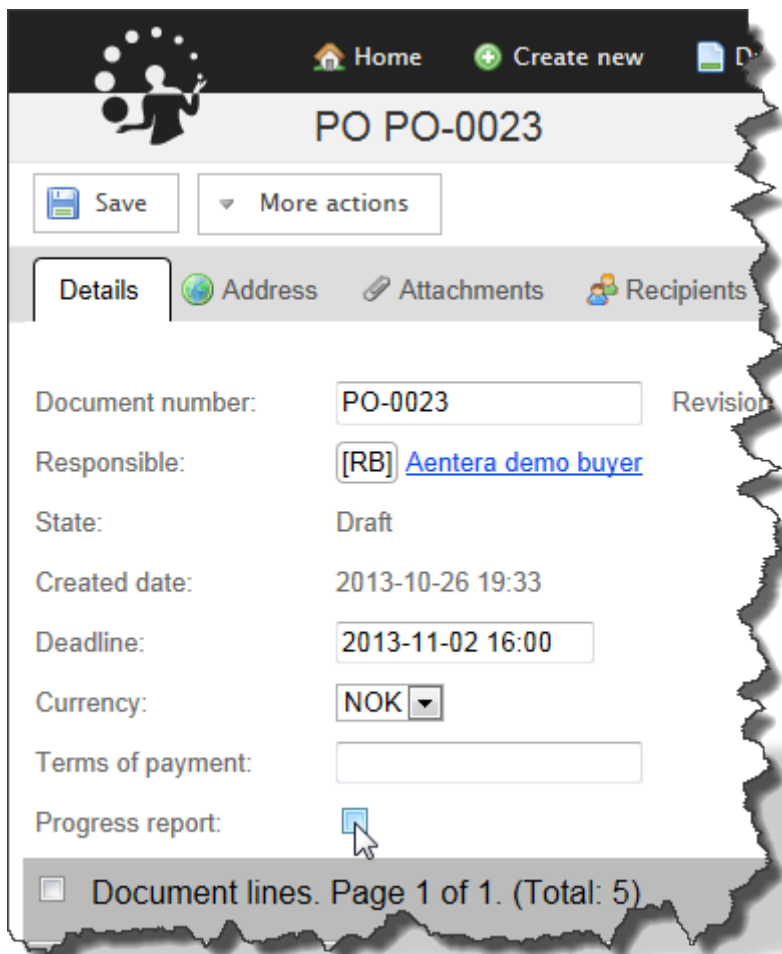
Reporting is on an ad-hoc basis, and no fixed intervals are specified for the progress reports. The Seller is free to report at any time, as long as the buyer has initiated the progress reporting.

8.1. Initiate progress reporting – on sending PO

The progress reporting can be initiated automatically when sending the PO. Check the *Progress Report* check-box before sending the *Purchase Order*.

The company administrator can set the default value for this attribute in the company settings.

If your POs are created through an ERP integration, this setting will be controlled through the integration.



The screenshot displays the AeCS system interface for a Purchase Order (PO) with ID PO-0023. The interface features a top navigation bar with 'Home' and 'Create new' links. Below the navigation bar, the PO ID 'PO PO-0023' is prominently displayed. A 'Save' button and a 'More actions' dropdown menu are visible. The main form area is divided into tabs: 'Details', 'Address', 'Attachments', and 'Recipients'. The 'Details' tab is active, showing the following fields:

- Document number: PO-0023
- Responsible: [RB] Aentera demo buyer
- State: Draft
- Created date: 2013-10-26 19:33
- Deadline: 2013-11-02 16:00
- Currency: NOK
- Terms of payment: (empty field)
- Progress report: (checkbox, highlighted with a mouse cursor)

At the bottom of the form, there is a section for 'Document lines' showing 'Page 1 of 1. (Total: 5)'.

Figure 29 - Initiate progress report when sending PO

8.2. *Initiate progress reporting – after PO confirmation*

If the buyer at a later stage decides that progress reporting is required, it can be initiated from inside the PO confirmation.

Open the PO confirmation and press the *Create PR* button. The seller will now be able to create progress reports for this PO.

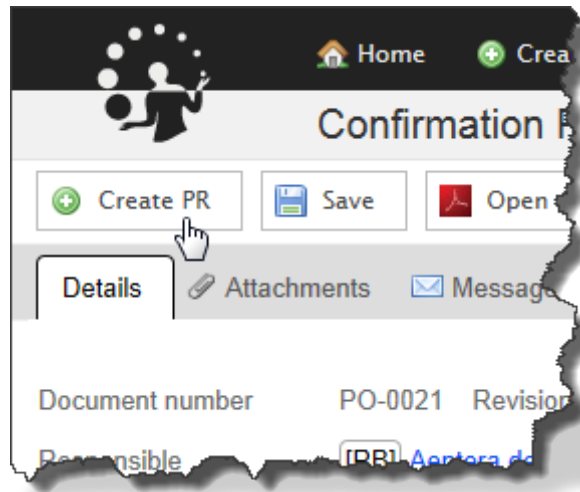


Figure 30 - Initiate progress report from PO confirmation

8.3. *Perform progress reporting*

Progress Reports PO-1252

Fields

Document Number: [PO-1252](#)
Revision: 4
Status: Draft
Company: [Support Buyer AS](#)
Sent:
Last Changed by: Support seller
Terms of Delivery: CIP - Carriage and Insurance Paid To
Destination: sksksk
Attachments: ☐ [History.gif - Weekly report](#)

Comments
Comments for PO

Upload File : [Bla qiennom...](#)
Description:
Document Line:

#	Item Number	Rev	Description	Qty	Unit	Delivery	Current Planned Delivery	Status	Comments
10	3333	A	Descr	60.00	pcs	2/19/2011 7:00 AM	2/19/2011 16:00	On Schedule	Comment for line 10
20.1	3333	A	Descr	5.00	pcs	2/3/2011 7:00 AM	2/3/2011 16:00	Ahead	Comment for line 20.1
20.2	3333	A	Descr	10.00	pcs	2/3/2011 7:00 AM	2/3/2011 16:00	Behind	Comment for line 20.2

Figure 31 - Progress reporting

As a seller, you might be requested to do periodical progress reporting. Open the PO and follow the progress report link in the upper right hand corner to open the progress report input form. If any progress report has already been created, the data from the most recent progress report will be displayed.

In the input form, you can enter/modify the following data:

- Comment for the PO
- Comment for each PO line
- Updated delivery date, if changed
- Status; On Schedule/Behind/Ahead/Delivered (subject to configuration by buyer)
- Attachments, linked to the individual PO lines if required.

To store the progress report in a draft status, press **Save**.

After all data is entered, press **Send Update** to save and send the progress report to the buyer.

Each time a new progress report is saved or sent, it creates a new progress report revision. You can browse forwards and backwards through the progress report by pressing the **Prev/Next** buttons.

The buyer is notified by email each time a new progress report is submitted.

8.4. Progress report overview

The buyer will have an overview of all the active progress reports in the *Progress Reports* tab in the main window

Progress Reports

[First](#)
[Prev](#)
[Next](#)
[Last](#)
[In Progress](#)
[Archive](#)
[Progress Report Lines](#)

Page 1 of 1. (Total: 9)

Progress Report	Revision	Status	Last Changed	Last Changed by
PO-1232	3	In Progress - Read	8/28/2010 10:49 PM	Support seller
PO-1222	24	Delivered	8/28/2010 10:23 PM	Support seller
PO-1221	5	Delivered	8/28/2010 8:03 PM	Support seller
PO-1220	1	In Progress - Read	8/28/2010 6:37 PM	Buyer Support
PO-1219	7	Delivered	8/25/2010 11:52 PM	Support seller
PO-1215	1	In Progress - Read	8/25/2010 11:38 PM	Buyer Support
PO-1216	1	In Progress - Read	8/25/2010 11:36 PM	Buyer Support
PO-1218	1	In Progress - Read	8/25/2010 11:33 PM	Buyer Support
PO-1252	4	Draft		Support seller

Figure 32 - Progress reports overview

You can choose between showing the *In Progress* or *Archived* progress reports. By clicking the link in the upper right hand corner, you can also display a list showing all PO lines with their individual statuses

To view the comments, details and attachments of each progress report, press the PO number to the left on the progress report line. This will display the last Progress report revision for that PO, and you will have the possibility to navigate between the different progress report revisions.

9. Archiving documents

For housekeeping purposes, it is a good practice to archive documents that are no longer active. The reasons for archiving documents might be:

- All items on the PO is delivered
- You do not require to follow up on the PO



Figure 33 -Archive document

To archive a document, use the *More actions* – *Archive* function when inside a document.

To archive multiple documents, check one or more documents in the overview and use the *More actions* – *Archive selection* function.

Archiving means that

- The document is no longer visible in the *Received / Sent items* lists. This will improve performance and tidiness in your user interface.
- The document will be visible in the *Archive* folder.
- Some document functions will be disabled

When archiving a document, any proceeding document in the document chain will also be archived. E.g. if you archive a PO, the corresponding RFP and Proposal will be archived, but not the PO confirmation.

It is possible to un-archive the documents to resume activities on them. Un-archive can be done on an individual document using the *More actions* – *UnArchive* function.

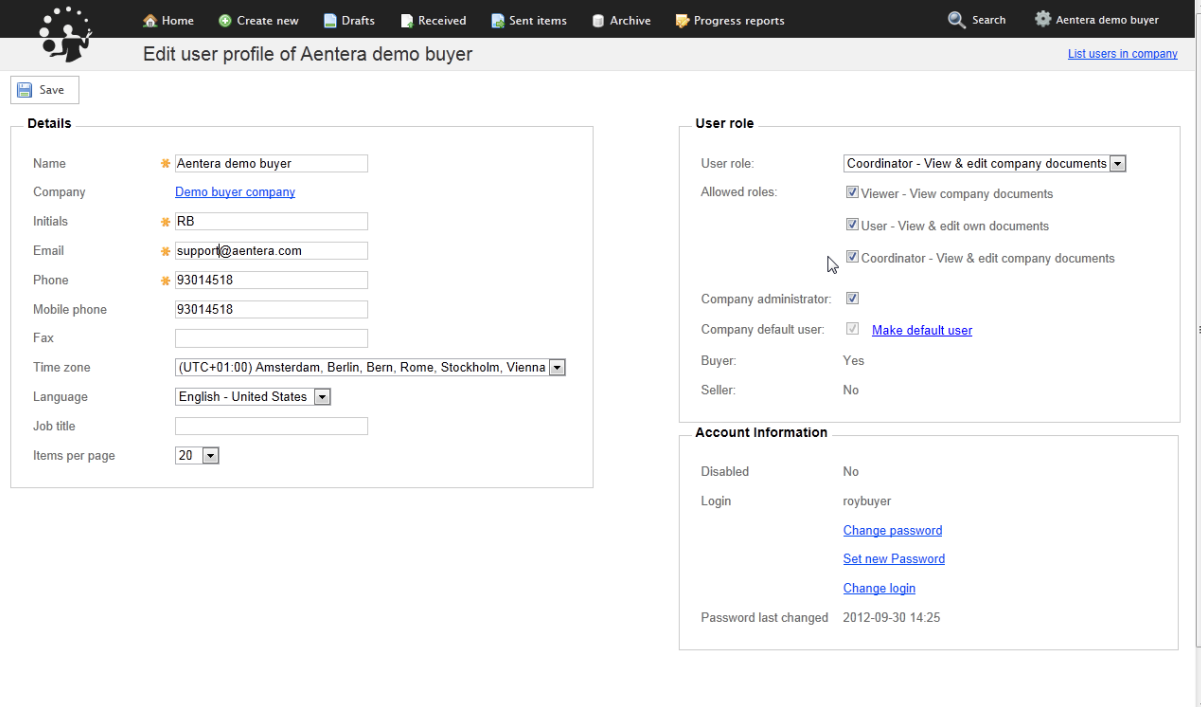
Alternatively, multiple documents can be un-archived by checking one or more documents in the archive overview and use the *More actions* – *Un-archive selection* function.

10. Administrative functions

10.1. Edit your user profile

As a user, you can maintain your own user data. Press the link with your name on it in the upper right hand corner of the screen to bring up your user data.

After you have updated your data in the form, press the Save button.



Edit user profile of Aentera demo buyer

[List users in company](#)

Details

Name:

Company: [Demo buyer company](#)

Initials:

Email:

Phone:

Mobile phone:

Fax:

Time zone:

Language:

Job title:

Items per page:

User role

User role:

Allowed roles:

- ☒ Viewer - View company documents
- ☒ User - View & edit own documents
- ☒ Coordinator - View & edit company documents

Company administrator: ☒

Company default user: ☒ [Make default user](#)

Buyer: Yes

Seller: No

Account information

Disabled: No

Login: roybuyer

[Change password](#)

[Set new Password](#)

[Change login](#)

Password last changed: 2012-09-30 14:25

Figure 34 - Edit user profile

10.1.1. User information

You may modify certain attributes of your personal user information:

- Name – Your full name
- Company – The name of your company (Just displayed, can only be changed by a company administrator in company settings)
- Initials – please be aware that the initials may be linked to a corresponding attribute in other internal or external systems, so it is advised that you speak to your company administrator before changing this attribute. For users running an ERP system, it shall normally be set to the same as in the ERP system.
- Email – Your email address
- Phone (Office/company and mobile) and fax.
- Time zone – Setting the time zone will affect the display of due dates and delivery dates. These timestamps will be displayed in your local time zone, according to this setting.
- Language used in AeCS
- Your job title
- Items per page – Determines the number of documents etc. to be displayed per page. The lower you set this number, the better response you will get. The higher you set this number, the fewer pages you will get to browse between.

There are some attributes that affect your user role and privileges:

- User role - See section 2.1 – “User roles” for a description of the different roles.
- Company administrator – If this attribute is set, you have access to administrate your company settings and information. You will also be able to add or modify users in your own company. A person can be set as company administrator by Aentera support or by an other company administrator within your company. There will be at least one company administrator within all companies in AeCS.
- Company default user – When a document is sent to your company and no specific recipient has been set by the other party, it will be sent to the person defined as the default user. There can be only one main user in the company.
- Buyer – Is set if you have a purchaser role, and your company is defined as a buyer company in AeCS.
- Seller – Is set if you have a seller role, and your company is defined as a seller company in AeCS.

There are some attributes related to your user account:

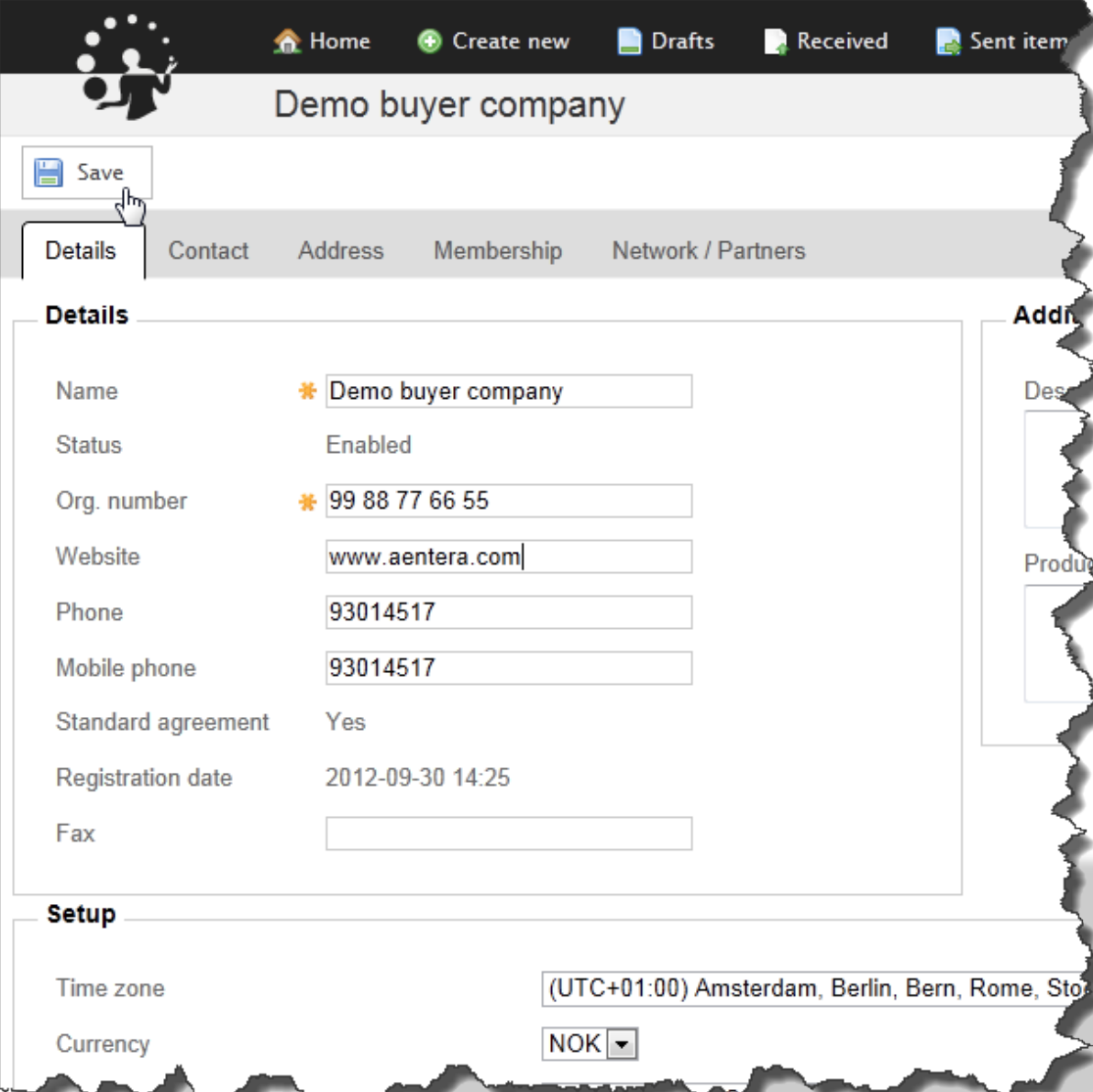
- Disabled – Shows if this user account is enabled or not.
- Login name- Your login name. Press the link in case you would like to change your login name.
- Change password – Press the link to bring up the dialog that allows you to change your own password.
- Set new password (admin only) – If a user has forgotten his/her password, you can use this function to send that user an email with instructions on how to set a new password. This way, the password can be changed without the administrator knowing what the new password is.
- Password last changed – Shows the timestamp for when your password was changed the last time.
- Last login – Shows the timestamp for when your last successful login was done.
- Failed logins – When logged into your own account, there will be nothing displayed. If logged in as an other user, this user will be able to see how many failed login attempts there have been since the last successful login for that account.

To find who is the Company administrator in your company, do the following:

1. Click your *company name* in the upper right hand corner of the AeCS window
2. Click *List Users* in company
3. Look for users that are marked as company administrator in the list.

10.2. Administrative functions for company (admin only)

There are a number of administrative functions that can only be accessed by a company administrator.



The screenshot shows a web interface for editing company details. At the top, there is a navigation bar with links: Home, Create new, Drafts, Received, and Sent item. Below this is a header for 'Demo buyer company'. A 'Save' button is visible. The main content area is divided into two tabs: 'Details' and 'Setup'. The 'Details' tab is active, showing a form with the following fields:

Field	Value
Name	* Demo buyer company
Status	Enabled
Org. number	* 99 88 77 66 55
Website	www.aentera.com
Phone	93014517
Mobile phone	93014517
Standard agreement	Yes
Registration date	2012-09-30 14:25
Fax	

The 'Setup' tab is also visible, showing fields for Time zone (set to (UTC+01:00) Amsterdam, Berlin, Bern, Rome, Sto) and Currency (set to NOK).

Figure 35 - Edit company details

10.2.1. Company details

There are a number of attributes for the company details:

- Name – The public name of the company.
- Status – Enabled/disabled. Can only be modified by Aentera.
- Org. number – The organization or publicly registered company number unique to your company in the country it is registered.
- Website – Your company's web address.
- Phone – The company phone number (e.g. main switchboard)
- Mobile phone – In case your company has a common mobile phone that can be used by external contacts.

- Standard agreement – Is set if your company is under a standard commercial agreement with Aentera Network AS.
- Registration date – The date your company was registered in AeCS
- Fax – The company fax number
- Description – Any description of your company that you would like to share in AeCS.
- Products & Services – Any description of your products and services you would like to offer in AeCS.

Attributes related to your company setup:

- Time zone – Which time zone your company is in. When a new user is created in your company, this is the default time zone set for that user.
- Currency – The default currency for new documents being created in your company.
- Language – The default language set for new users in the company.
- Challenge key – a key used for identifying your company when accessing AeCS through an integration.
- Company roles – Can be *Buyer* and/or *Seller*
- #New doc lines – Determines how many item lines there will be in a document on creation
- Rules for document changes – Shows which set of rules is set for your counterparts' access to modify attributes on documents sent from you.
- Progress report by default – When set, progress reporting will automatically be initiated when a PO is sent.
- Allow seller to split procurement lines – As a buyer, you can allow the seller to split your RFP or PO item lines into more sub-deliveries with different quantities at different delivery dates. WARNING: If you are using an integration between your internal ERP-system and AeCS this function must NOT be enabled without verifying that your integration can support this function.
- Company logo – Your current company logo.

10.2.2. Contact information

Enter the contact information for the person responsible for AeCS in your company. This is the person Aentera Network AS will contact in case we need to get in touch with you.

10.2.3. Addresses

You may enter different addresses for Office, Invoice and Delivery. These are the default address that will be used on new documents, unless the user specifically enters anything else when creating the new document.

10.2.4. Membership

In here, the details about your Aentera membership are displayed.

The main details are:

- Trial –Whether you company has a trial or regular membership.
- Currency – The currency for billing your AeCS fee.
- Terms of payment – Terms of payment for the AeCS fee.
- Invoicing – When did invoicing start, and when was the last invoice submitted.
- Reference – Any reference for the invoice.
- VAT – The VAT rate to be set for your invoice.
- Challenge key – a key used for identifying your company when accessing AeCS through an integration.

- Member agreement – You can use the link to download the agreement for the AeCS membership.

10.2.5. Network/partners

In here, all your AeCS business partners are listed. Press the linked company name to bring up the respective company's details.

10.2.6. Upload company logo

Press the upload company logo in the upper right hand corner of the Edit company screen to bring up the dialog. The valid formats for logos are:

- .gif (Graphics Interchange Format)
- .jpg/.jpeg (Joint Photographic Experts Group)
- .png (Portable Network Graphics)

Please note that regardless of the logo size, it will be reduced on upload in order to fit the AeCS layout and to reduce the amount of data the users will have to download for each document.

If the quality of your logo is degraded due to this, you should try to reduce the size of your logo prior to uploading it to AeCS: If it still is not the proper quality, please contact Aentera support.

10.2.7. User administration

When accessing the *User* administration you will get a list of all users in your company.

As a company administrator you can change all the same attributes as the user himself can do. (According to section 10.1 – “*Edit your user profile*”). In addition, you can change these attributes:

- Company admin – You can assign company administrator access in your company for this user. There can be more than one company administrator for a company.
- Company default user – Select to assign this user as the default user for your company. If your counterpart has not specified a recipient in your company, documents will be sent to this default user. Please note that there can be only one company default user per company.

In here, you can also add new users in your company by clicking the *Register new user* link and enter the data required in the form.

10.3. Company settings (admin only)

As a company administrator, you also have access to a number of settings for your company. To access these settings, press the *Settings* link in the upper right hand corner of your screen.

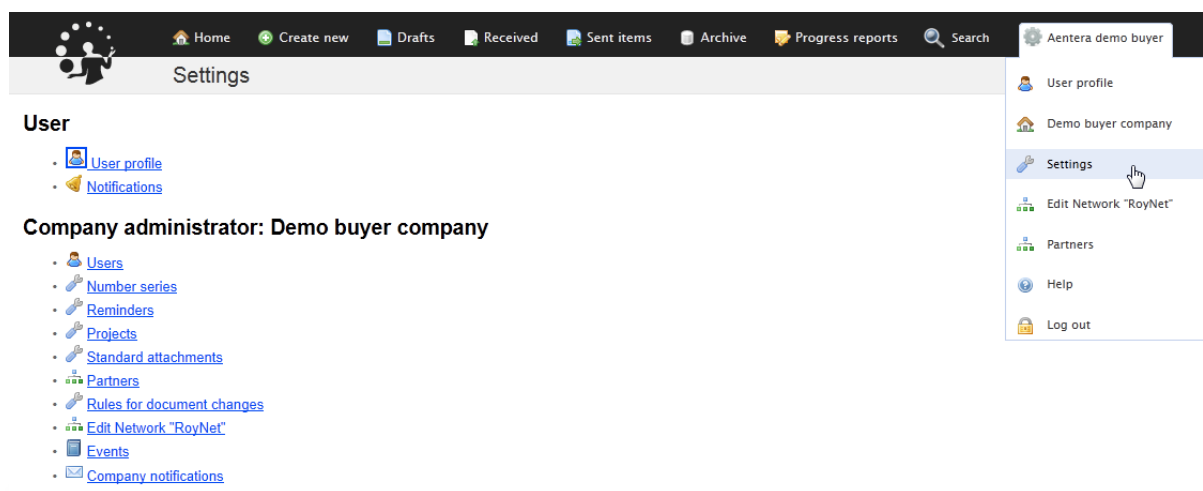


Figure 36 - Company settings overview

10.3.1. Number series

When using AeCS through an ERP-integration, document numbers will automatically be assigned by your ERP system. This section is not relevant for documents that are created through an integration.

If AeCS is used stand-alone, you may configure number series that will be used for the different document types.

The number series will use a number that increments in steps of one each time a new document is created.

If number series are not activated for a document type, the user will have to make up a new document number on his own for the new document.

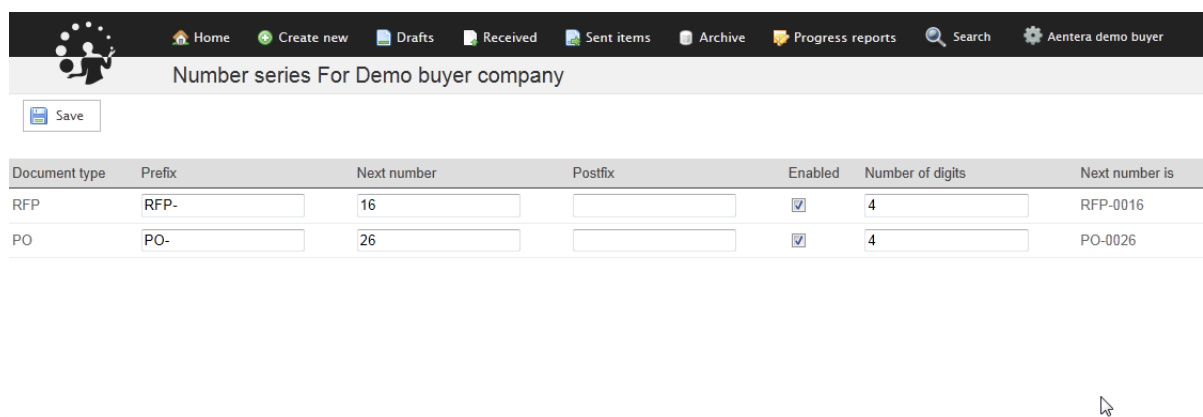


Figure 37 - Number series configuration

- Prefix – Defines a text as a prefix to the document number. Can be any alphanumeric characters.
- Postfix– Defines a text as a postfix to the document number. Can be any alphanumeric characters.
- Next number – specifies the number to be used for the next document created. Be cautious not to set this number to a lower number than the current one, as this may cause conflicts with existing documents.
- Enabled – Enable or disable this number series generation.
- Number of digits – Specify the number of digits to be used. The document number will be padded with leading '0's to get the specified number of digits.

- Next number is – Displays the next number to be used, based on your setting.

10.3.2. Projects

You can define projects to be used for your documents. This will make it easier to track documents and organize your work. The company administrator can create, modify and delete projects.

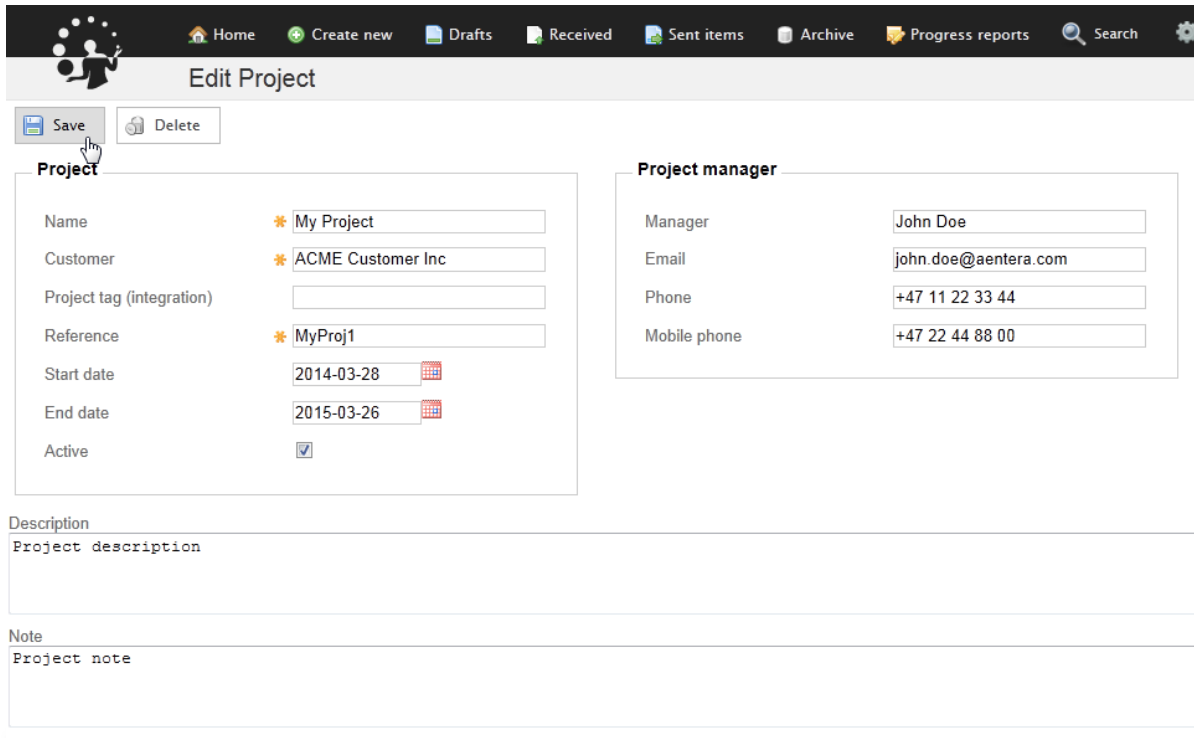


Figure 38 - Projects configuration

The attributes for the project are:

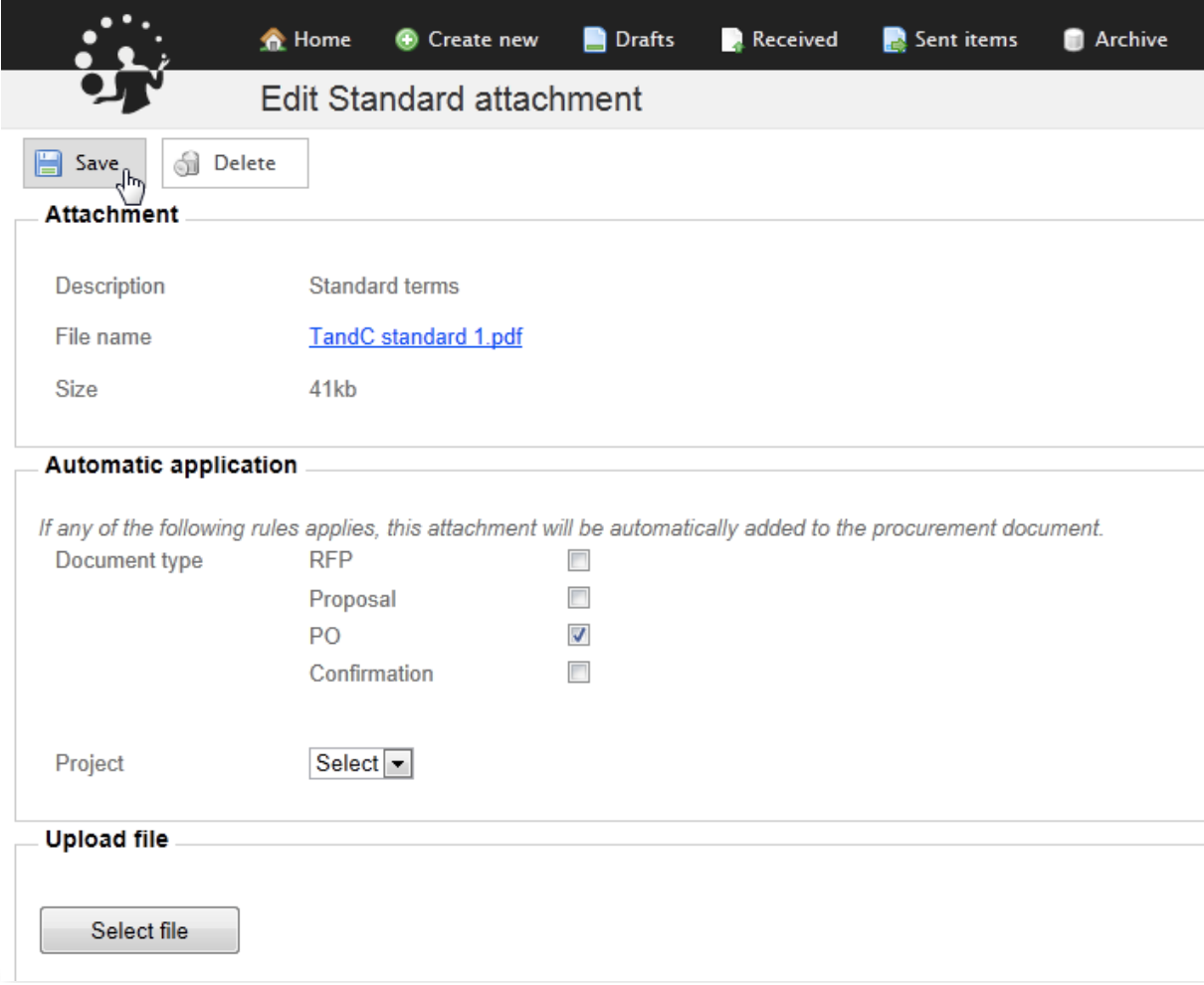
- Name – Give a name to the project.
- Customer – Identifies the customer
- Project tag – Can be set and used with an integration to your ERP system.
- Reference – Any reference to a contract / PO or other.
- Start and end dates – Specify the start and end dates of the project. The project will automatically be de-activated when the end date is passed.
- Active – Only active project will be displayed in the user interface when creating new documents.

You can also enter contact details for the project manager.

10.3.3. Standard attachments

You may define standard attachments that always will be attached to new documents being created. This can e.g. be standard terms and conditions that always shall apply. The attachments can specified individually based on document type and project.

When bringing up the list of standard attachments, you may create new or modify existing standard attachments.



The screenshot shows the 'Edit Standard attachment' interface. At the top is a navigation bar with icons for Home, Create new, Drafts, Received, Sent items, and Archive. Below the navigation bar is a header area with a user icon and the title 'Edit Standard attachment'. The main form contains three sections: 'Attachment', 'Automatic application', and 'Upload file'. The 'Attachment' section displays the description 'Standard terms', the file name '[TandC standard 1.pdf](#)', and the size '41kb'. The 'Automatic application' section includes a note: 'If any of the following rules applies, this attachment will be automatically added to the procurement document.' It lists document types with checkboxes: RFP, Proposal, PO (checked), and Confirmation. There is also a 'Project' dropdown menu currently set to 'Select'. The 'Upload file' section has a 'Select file' button.

Attachment	
Description	Standard terms
File name	TandC standard 1.pdf
Size	41kb

Automatic application	
<i>If any of the following rules applies, this attachment will be automatically added to the procurement document.</i>	
Document type	RFP ☐
	Proposal ☐
	PO ☒
	Confirmation ☐
Project	Select ▼

Upload file
Select file

Figure 39 - Standard attachments

10.3.4. Partners

Lists all the AeCS business partners in your purchasing network with the contact details. You are also able to access the company details by following the link on the company name.

10.3.5. Rules for Document changes (buyer companies only)

Out-of-the-box, AeCS is set up with a set of rules that defines which attributes the seller is allowed to modify when responding to an RFP or a PO. The rules scheme also defines which Purchase order confirmation changes that require the buyer to confirm the changes made by the seller.

If you want to create your own set of rules, press the "Override settings" button and modify the rules scheme as desired. After creating your new scheme, press "Save" to submit and activate the scheme

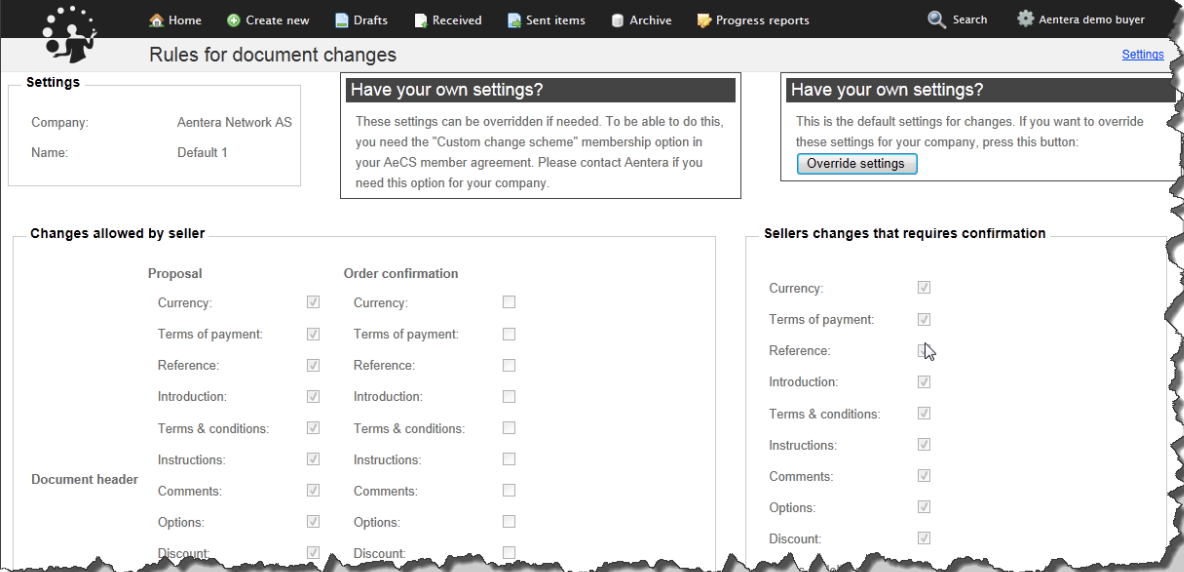


Figure 40 - Rules for document changes

10.3.6. Progress Report Status Set

AeCS comes with a set of standard statuses for progress reporting. It is possible to customize these statuses. Enter the Progress Report Status Set Dialog to create a new status set.

Progress Report Status Set

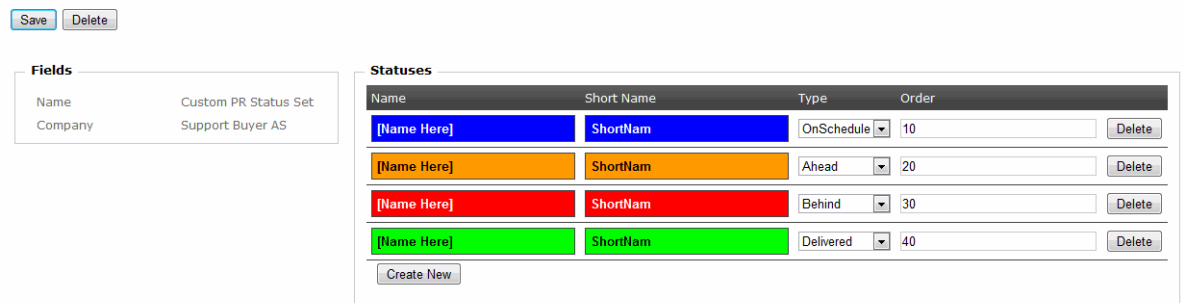


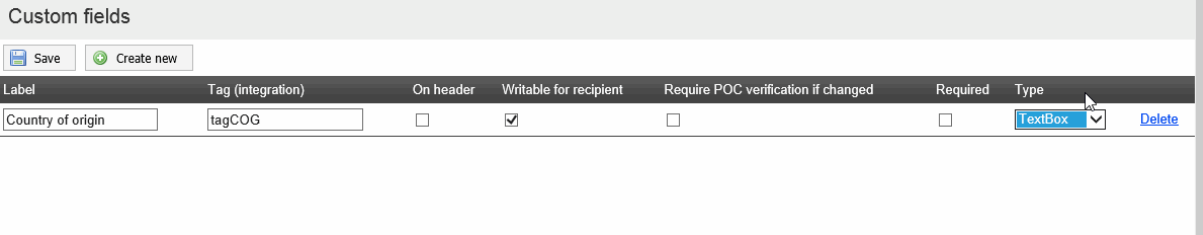
Figure 41 - Progress report status set configuration

To create a new status, select the type (Behind/On Schedule/Ahead/Delivered). Type a Name and short name, and enter a number to determine its Order of sorting/progress.

After all statuses are created, press save to activate your new Progress Report Status Set.

10.3.7. Custom fields

In addition to the standard data fields for the RFP or PO, it is possible to define custom fields. This can be done by the company administrator. In the *Settings- Custom fields* menu, you will get the following form:

A screenshot of the 'Custom fields' web interface. At the top, there are 'Save' and 'Create new' buttons. Below is a table with columns: Label, Tag (integration), On header, Writable for recipient, Require POC verification if changed, Required, and Type. A single row is visible with the label 'Country of origin', tag 'tagCOG', and other fields set to default or checked. The 'Type' dropdown is open, showing 'TextBox' selected. A 'Delete' link is at the end of the row.

Label	Tag (integration)	On header	Writable for recipient	Require POC verification if changed	Required	Type	
Country of origin	tagCOG	☐	☒	☐	☐	TextBox	Delete

Figure 42 – Define custom attributes

The following can be defined:

- Custom attribute name.
- An ID for mapping with the ERP integration.
- Whether the attribute will be on the doc header or doc line.
- Whether it shall be possible for the recipient to modify the field
- Whether it triggers a change to the POC if it is modified on a PO confirmation.
- Whether it is a required field or not
- The field type can be *Text area*, *Text box*, *Checkbox* or *Date picker*.

Be careful when deleting a custom attribute, as it may affect your integration or existing documents.

11. Support

If your questions are not answered from this user manual, or you have problems using the AeCS system, please contact Aentera support.

Email: support@aentera.com